TM-4 APPROVER COURSE

USING NASA'S TRAVEL MANAGER SYSTEM

<u>DELEGATE AUTHORITY</u>

This document covers the steps for an approver to delegate authority and to remove the authority once delegated.

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A. SETUP

Approvers have the ability to delegate their Travel Manager's document approval authority to another approver. This will route all documents the approver has not yet received to the delegated approver. The delegated approver will be responsible for approving all documents and an email notification will be sent to both approvers. After the designated approver signs the document, routing will continue normally. It is the original approver's responsibility to process all documents routed to the original approver prior to the delegation.
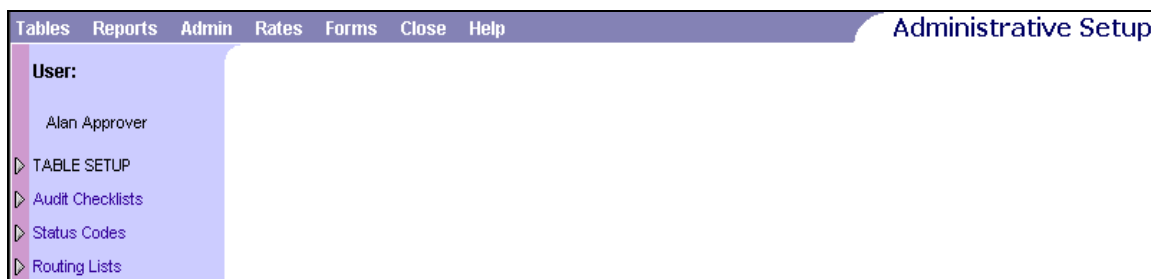

NOTE

The Travel Manager system will allow delegation of authority to any user within the system regardless of authority, but if the delegated user does not have the same authority or higher of the user delegating the authority, they will be only able to use the default status and the sign status to stamp the document(s).

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1. Click on the **Setup** link, on the **Tab Menu Toolbar** at the top, to go to the **Setup** page.

2. The browser will launch a new window over the original window displaying the **Setup** window.

3. Click on the **Admin** link on the **Tab Menu Toolbar** at the top.

4. Click on the **Delegate Authority** link on the **Document Processing Toolbar** on the left side of the page.

5. The **Delegate Authority** window will be displayed.

B. DELEGATE AUTHORITY

1. Type the name of the approver to whom authority will be delegated in the **Search Criteria Name** field and click the ⟨Search⟩ button, beside the **Name** field, to display the name in the **Delegate Authority** list at the bottom.

2. Scroll to find the name in the **Delegate Authority** list and click the name.

3. If the person entered has a different authority level than the approver delegating the authority, the **Signature** page will display a message stating what the person's authority level is and asking if the delegate authority process should continue.

4. Click the ⟨Close⟩ **without Delegating** button, in the 'For this page you can:' area in the top right, to discontinue processing. The user selected does not have authority to approve documents.

5. Type another name of an approver to whom authority will be delegated in the **Search Criteria Name** field and click the ⎡Search⎤ button, beside the **Name** field, to display the name in the **Delegate Authority** list.

6. Click the appropriate person's name in the list to display the **Signature** box.

7. Click in the **Signature PIN** field and enter the PIN.

8. Click the ⎡Save⎤ **Authority Delegation** button in the 'For this page you can:' area in the top right.

9. The **Delegate Authority** window displays the person's name to whom the authority is delegated.

10. Click the **Close** **Delegate Authority** button in the 'For this page you can:' area in the top right.
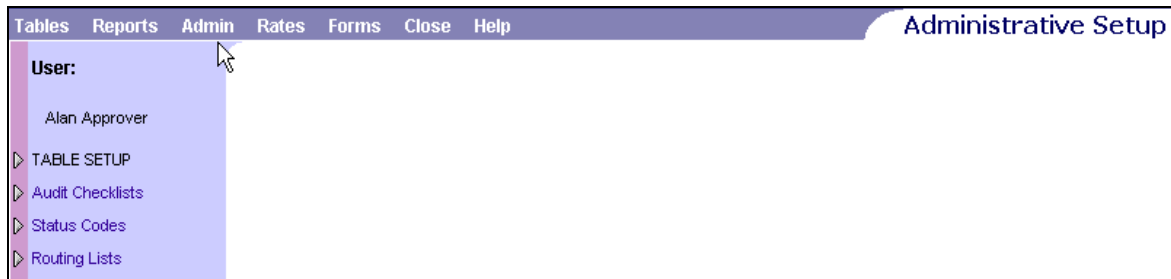
C. REMOVE DELEGATED AUTHORITY

Approvers remove authority to another user in somewhat the same way they delegate authority. After the authority is removed all documents will be routed to the original approver.
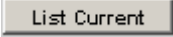
1. Click on the **Setup** link, on the **Tab Menu Toolbar** at the top, to go to the **Setup** page.

2. The browser will launch a new window over the original window displaying the **Setup** window.
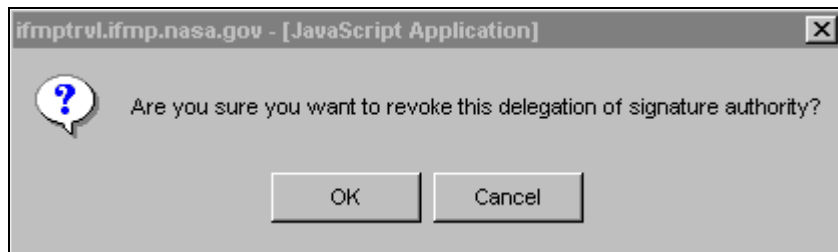

3. Click on the **Admin** link on the **Tab Menu Toolbar** at the top.

4. Click on the **Delegate Authority** link on the **Document Processing Toolbar** on the left side of the page.
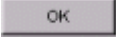
5. Click the [List Current] **Authority** button, in the 'For this page you can:' area in the top right, to display the name.

6. Click the **Delete** icon [X] in the **Current Authority** column next to the name to which delegation authority was given. The following confirmation box will be displayed.

7. Click the [OK] button. Delegation authority will be revoked and new documents will route original Approver and any existing back-ups in the current routing chain.

8. Close the browser window by clicking the "X" on the browser window in the top right corner to close the **Delegate Authority** page.